WASHINGTON STATE ROAD USAGE CHARGE

STEERING COMMITTEE MEETING

November 9, 2016
AGENDA

• Welcome
• Meeting Overview & Objectives
• Pilot Project Objectives & Evaluation Criteria
• Proposed Pilot Operations & Technology
• Pilot Project Participation
• Pilot Project Communications
• Pilot Project Delivery Tasks & Next Steps
• Public Comment
OVERVIEW & OBJECTIVES

Jeff Doyle, D’Artagnan Consulting
MEETING OVERVIEW

• Brief recap of the forthcoming Washington RUC Pilot Test
• Meeting topics, objectives and discussion points
• Format for the presentations and discussion
WASHINGTON RUC PILOT PROJECT

Federal funding for:

• Year-long, statewide test of Washington-designed RUC system for up to 2,000 volunteer test vehicles
• Partners: OReGO, City of Surrey, BC, and Seattle Electric Vehicle Association
• Choices: Time Permit, Odometer Charge, and Automated Mileage Reporting

Unique features:

• International Interoperability test with British Columbia drivers
• Financial Interoperability test with Oregon
• Feedback specifically from EV drivers
• Hackathon event to develop new technology or RUC app for smartphones
MEETING TOPICS, OBJECTIVES & DISCUSSION POINTS

Topics covered today:

- How will the pilot project be evaluated?
- What changes are proposed (and what assumptions made) in how the pilot will be operated?
- Who, how many, and how will volunteers be recruited to participate in the pilot?
- How will details of the pilot project be communicated with the public, media, and key stakeholders (including public agencies)?

Primary objectives:

- Discuss whether the recommended approaches and operational assumptions are reasonable and appropriate
- Provide ideas and suggestions to help recruit up to 2,000 test vehicles
- Provide reactions and input into the Communications plan
WASHINGTON RUC PILOT EVALUATION MEASURES

Travis Dunn, D’Artagnan Consulting
PILOT PURPOSE

Gather information about and evaluate the performance of a prospective road usage charge (RUC) policy for Washington use.
EVALUATION PRINCIPLES

- Address Steering Committee guiding principles
- Be measureable
- Be concise
EVALUATION PROCESS

Develop Evaluation Methods
- Participant surveys
- Pilot data analysis

Implement Measurement
- Conduct surveys
- Analyze data
- Use feedback to improve pilot as appropriate

Report
- Quantitative findings
- Qualitative findings
- Integration with other pilot reporting
INPUTS TO FORMULATION OF EVALUATION MEASURES

- Guiding principles
- FAST Act criteria
- Criteria and measures used elsewhere
# Guiding Principles vs. FAST Act Pilot Objectives

<table>
<thead>
<tr>
<th>Guiding Principle</th>
<th>Related Pilot Objectives from FAST Act Section 6020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transparency</td>
<td>Public acceptance</td>
</tr>
<tr>
<td>Complementary policy objectives</td>
<td>Congestion mitigation (if appropriate)</td>
</tr>
<tr>
<td>Cost-effectiveness</td>
<td>Cost of system administration</td>
</tr>
<tr>
<td>Equity</td>
<td>Income, geographic, urban vs. rural equity</td>
</tr>
<tr>
<td>Privacy</td>
<td>Protection of personal privacy</td>
</tr>
<tr>
<td>Data Security</td>
<td>Reliability and security of technology</td>
</tr>
<tr>
<td>Simplicity</td>
<td>Ease of compliance</td>
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<tr>
<td>Accountability</td>
<td>Implementation</td>
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<tr>
<td>Enforcement</td>
<td>Auditing and enforcement</td>
</tr>
<tr>
<td>System Flexibility</td>
<td>Use of independent third-party vendors</td>
</tr>
<tr>
<td>User Options</td>
<td>Flexibility and user choice</td>
</tr>
<tr>
<td>Interoperability and Cooperation</td>
<td>Interoperability</td>
</tr>
<tr>
<td>Phasing</td>
<td>N/A</td>
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</tbody>
</table>
## Examples of Evaluation Measures NOT Proposed

<table>
<thead>
<tr>
<th>Example</th>
<th>Reason Not Proposed</th>
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<tbody>
<tr>
<td>Number of participant inquiries and average response times</td>
<td>Too detailed for policy purposes; more important to focus on qualitative inquiry trends and participant survey responses</td>
</tr>
<tr>
<td>Number of participants in pilot</td>
<td>The number is a means to and end, not an end in itself</td>
</tr>
<tr>
<td>Pilot implementation cost</td>
<td>Cost of the pilot is not as relevant as what it tells us about the cost to implement a real system</td>
</tr>
<tr>
<td>Ability to enforce compliance</td>
<td>More important in a test environment to understand compliance factors and compare relative effectiveness of potential enforcement tools</td>
</tr>
<tr>
<td>Amount of revenue generated</td>
<td>Purpose of pilot is not to generate revenue but rather to improve understanding of RUC as a revenue policy</td>
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</tbody>
</table>
• 23 measures across 13 categories
• Measures define what will be determined from the pilot (quantitatively calculated or qualitatively assessed), in order to provide information to policy makers
• Measures are not targets or requirements (e.g., not pass/fail)
TRANSPARENCY

1) Change in participant understanding of gas tax rate, collection method, and use

2) Change in participant understanding of RUC rate, collection method, and use
3) Impact of pilot on driving habits of participants

4) Impact of pilot on stated vehicle purchasing preferences of participants
COST-EFFECTIVENESS

As a small-scale effort, the pilot project will not itself generate data that can be evaluated for cost-effectiveness. We recommend that information from the pilot be used to refine and update the RUC business case analysis.
5) Total and per-mile RUC vs. gas tax paid by urban, suburban, vs. rural status of participant

6) Total and per-mile RUC vs. gas tax paid by participant income

7) Total and per-mile RUC vs. gas tax paid by in-state vs. out-of-state participants

8) Participant expectations and before-and-after perceptions of RUC equity relative to gas taxes
9) Participant perception of privacy protection, including any changes in perception during the pilot

10) Relative ability of mileage reporting methods to protect participant privacy
11) Participant perception of data security, including any changes in perception during the pilot

12) Relative ability of mileage reporting methods to provide data security
SIMPLICITY

13) Time and indirect costs expended by participants to comply with pilot tasks

14) Participant understanding of compliance requirements
ACCOUNTABILITY

15) Clarity of assignment of responsibility and oversight

16) Accuracy of reported road usage, revenue collected, and revenue distributed
ENFORCEMENT

17) Participant perceptions of relative effectiveness of enforcement methods in maintaining compliance

18) Relative level of effort of enforcement methods (if tested) to implement and operate on a small-scale basis
In a short-term pilot project, long-term system flexibility cannot be effectively measured. We recommend outside policy analysis to address this principle.
19) Participant overall satisfaction and relative satisfaction with choices available in the pilot project

20) Reason for participant preferences of various mileage reporting methods
INTEROPERABILITY AND COOPERATION

21) Relative level of effort (staff time and direct costs) to achieve interoperability with (Oregon) and without (British Columbia) real money transactions

22) Participant understanding of interoperable RUC

23) Relative ease of compliance for interoperability test participants vs. others
PHASING

Information from policy analysis, legal analysis, and business case analysis can inform this guiding principle.
PROPOSED PILOT OPERATIONS & TECHNOLOGY
Matthew Dorfman, D’Artagnan Consulting and Roshini Durand, Confluentis
RESULTS OF SURVEY OF EMERGING TECHNOLOGIES

Main take-aways:

• Emerging (or re-emerging) technologies will not be sufficiently mature for a pilot in the 2017 timeframe (5G, pay-at-the-pump)

• MVerity smartphone app is a good way of reporting odometer readings

• GPS Smartphone option needs work – see Washington RUC Hackathon event

• OBD-II devices (still) work well

• In-vehicle telematics: limited availability based on vehicle make and model; provides odometer readings only (no automated calculation of out-of-state or other non-taxable miles)
INTEROPERABILITY (I/O) TEST WITH OREGON

Limited number of Washington and OReGO participants will test real money payments!

Next Steps (in conjunction with OReGO):

• Convene Washington-Oregon working group to outline goals, objectives, parameters and schedule for the test

• Determine how selected participants will be provided money for their participation in this financial interoperability (I/O) test

• Identify differences between Oregon operations and Washington pilot, then reconcile through adoption of I/O procedures

• Determine frequency and content of data flows between Washington and Oregon RUC
INTEROPERABILITY (I/O) TEST WITH BRITISH COLUMBIA

The City of Surrey agreed to partner in the Washington RUC pilot!

Approach and expected parameters:

• At least 50 drivers from Surrey, British Columbia and surrounding area (maximum participation in Washington pilot capped at 200)
• No real money exchanged, but indicative RUC account statements will be provided
• Allow Surrey to determine their own rates, tax boundaries, etc. (subject to project funding limitations)
• Not all Operational Concepts will be available to Surrey participants (e.g., DOL-assisted manual odometer readings)
• Continue meetings with Surrey officials to define goals and objectives, parameters of participation and schedule for the test
• Must stay coordinated with Surrey and greater metro Vancouver!
Can IT engineers and software developers provide a novel solution to mileage reporting by smartphone?

General approach:

- Goal: create a prototype solution (software or device) that can be tested by a small pool of participants during the Washington pilot

- Developers provided with problem statement, desired outcome, relevant information, and charge: find a solution

- Competitive event, with finalists earning a cash stipend for final development and if warranted, beta testing in the Washington pilot

- Tentative schedule: development in Summer/Fall 2017; beta testing in Winter 2017/18; deployment Summer 2018
We created technical documentation based on the Washington Stake RUC ConOps focused on the pilot.

• We replaced the word “Principal” with “[Pilot] Participant.” This word refers to the RUC payer.

• We moved Smartphone to be a technology that supports Operational Concept C: Automated Distance Reporting.

• We are also creating other technical documents for system procurement: a system requirements document and an interface control documents.

• The focus of all these documents is on the pilot experience as opposed to general revenue operations.
OPERATIONAL CONCEPT A: TIME PERMIT

The Time Permit provided unlimited driving for a specific period.

Participant Experience

• The participant chooses time permit on the pilot project website or by phone.

• Optionally, the participant may provide their vehicle’s current odometer reading.

• The Participant is notified of the reminders that will be sent (typically by e-mail).

• While the permit is valid, the participant drives without limitation.

• The participant purchases new permit when reminder comes.

• If participants fails to purchase new permits, they get further reminders.
OPERATIONAL CONCEPT B: ODOMETER CHARGE

The Odometer Charge is road charges based on odometer readings.

Participant Experience

• The participant chooses Odometer Charge on the pilot project website or by phone.

• The participant may choose the mobile phone or DOL subagent options.
  • The mobile phone option means the participant takes pictures of odometer with his/her own phone.
  • For the subagent option, the subagent has a phone for participant use.

• The first invoice for is for 2250 miles covering the first 3 months of the pilot.

• The participant provides an odometer reading & gets an invoice every 3 months.
  • The participant pays for 2250 miles for the next 3 months.
  • The participant gets credits for any miles driven less than 2250 in the past 3 months.
  • The participant pays additional charges for any miles driven over 2250 in the past 3 months.
OPERATIONAL CONCEPT C: AUTOMATED DISTANCE CHARGE

- OBD-II Device
- Telematics
- Smartphone
OPERATIONAL CONCEPT C: AUTOMATED DISTANCE CHARGE

The automated distance charge means that road charges are automatically recorded and posted to a participant account.

Participant Experience

- The participant creates an account with an account manager.
  - They provide contact info, VIN, odometer reading.
- The participant sets up the mileage reporting technology:
  - **OBD-II device**: participant plugs in device.
  - **Mobile phone**: participant downloads and sets up the app.
  - **Telematics**: participant sets up telematics account and registers it with the account manager.
- The participant gets an invoice/statement each month.
- The participant may have the option to use value added services with the OBD-II devices.
**Usage Scenarios in CONOPS**

- Pilot Participant Sign up—Enroll a Pilot Participant
- Pilot Participant Sign up—Enroll a New Vehicle
- Change Operational Concepts
- Road Usage (Driving)
- Calculate Road Usage Charges
- Provide RUC Invoices
- De-enrolling a vehicle from the pilot
- Enforcement
- Manage Failure Conditions
## PILOT DESIGN QUESTIONS

<table>
<thead>
<tr>
<th>#</th>
<th>Pilot Design Question</th>
<th>Assumption</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Who operates accounts? Will there be both public and commercial account management? Which operational concepts will be supported by the different account managers (organizations that run participant accounts)?</td>
<td>A state account manager operates Time Permit and Odometer Charge; a Commercial Account Manager operates Automated Distance Charge</td>
<td>Time Permit and Odometer Charge do not support provision of value added services to users. Automated distance charge does, and doing so supports the “open market” concept.</td>
</tr>
<tr>
<td>2</td>
<td>Should RUC enforcement be simulated in the pilot? If so, what activities will it comprise?</td>
<td>Yes; violation detection and compliance reminders</td>
<td>Enforcement is a core part of the system</td>
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## Pilot Design Questions (Continued)

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<tbody>
<tr>
<td>3</td>
<td>If simulated enforcement is included, should simulated penalties/citations be included in the pilot?</td>
<td>No</td>
<td>Issuance of mock penalties/citations is likely to cause confusion, since the pilot test is strictly voluntary.</td>
</tr>
<tr>
<td>4</td>
<td>Which Operational Concepts should be interoperable with Oregon and Surrey participants?</td>
<td>OBD-II device with GPS (and potentially, an approach developed during the Hackathon)</td>
<td>Location data are needed to detect state borders for full interoperability</td>
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<tr>
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<td>Assumption</td>
<td>Reason</td>
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<tr>
<td>5</td>
<td>Should there be an option for private roads to be automatically credited as free travel?</td>
<td>Yes, at least as an option</td>
<td>There may be demand for this feature in a future RUC system.</td>
</tr>
<tr>
<td>6</td>
<td>Will RUC invoice <strong>payments</strong> be simulated? If yes, how?</td>
<td>No</td>
<td>Payments are a familiar activity for volunteers; testing this aspect doesn’t provide insights into RUC policy or operations.</td>
</tr>
<tr>
<td>#</td>
<td>Pilot Design Question</td>
<td>Assumption</td>
<td>Reason</td>
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<tr>
<td>7</td>
<td>What are the duration(s) for Time Permits and Odometer Charge readings?</td>
<td>30-day and 90-day Time Permits; Odometer Charge reporting required at 90 days</td>
<td>Multiple reporting periods are desirable, but not so frequent as to be burdensome to participants.</td>
</tr>
<tr>
<td>8</td>
<td>Which technologies should support Automated Distance Charge: on-board diagnostic (OBD-II) devices, telematics, smartphone?</td>
<td>OBD-II and Smartphone</td>
<td>Telematics is only supported by limited number of vehicles, and it does not include location awareness for interoperability.</td>
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### PILOT DESIGN QUESTIONS (CONTINUED)

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<tr>
<th>#</th>
<th>Pilot Design Question</th>
<th>Assumption</th>
<th>Reason</th>
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<tbody>
<tr>
<td>9</td>
<td>What should be the basis of the Time Permit rate for the different lengths of Time Permits?</td>
<td>98th percentile of vehicles – 35,000 miles per year multiplied by the mileage rate</td>
<td>Rate should be high enough to discourage overuse/abuse &amp; maintain revenues.</td>
</tr>
<tr>
<td>10</td>
<td>Do participants on a Time Permit receive a separate tax credit for fuel consumed?</td>
<td>No</td>
<td>Credit could exceed value of Time Permit. Permit should be priced to include a standard credit.</td>
</tr>
</tbody>
</table>
TARGET NUMBER & CHARACTERISTICS OF PARTICIPANTS

Shannon Crum, D’Artagnan Consulting
PILOT FEATURES RELEVANT TO VOLUNTEER RECRUITING

- Test international interoperability
- Test state-to-state interoperability with OreGO
- Represent the geographic diversity of the entire state.
- Recruit, test, and evaluate a RUC system as an alternative to special license surcharges on plug-in electric vehicles (PEVs)
- Explore opportunities to leverage third-party enterprises (subagents and County Auditors) that conduct vehicle-licensing activities

Key Assumption: pilot is to consist of no more than 2000 Washington vehicles.
RECOMMENDED REGIONS

• Support four key pilot features
• Reflect the geographic, economic, and demographic diversity of the state
  • Housing and employment patterns
  • Income
  • Ethnicity
  • Age distributions
• Target regions are defined to create a sufficiently large and diverse pool of prospective participants
RECOMMENDED REGIONS

• Leverage pre-existing regional boundaries and communications channels
  • MPO
  • RTPO
  • Legislative districts
  • Media market boundaries
• Surrey is a key partner
• Will recruit up to 200 Surrey residents to participate in test of international interoperability
• Test technological and financial interoperability with Oregon DOT’s OregO system

• Oregon DOT is a key partner
  • Will recruit ORegO customers to participate in test of interstate interoperability
TEST INTERSTATE INTEROPERABILITY WITH OREGO

• Are currently enrolled in OreGO
• Have a GPS-enabled mileage reporting device
• Drive into Washington at least occasionally and preferably on a regular basis
• Are willing to participate in Washington’s pilot (this is critical since the Washington/Oregon component of the pilot will exact “real” payments from participants.
• A large number of OreGO participants is not required since this feature is a proof-of-concept for financial interoperability. All funds sent by OreGO participants to Washington will be refunded at the conclusion of the pilot; funds paid by Washington residents will be “seeded” by the pilot project
RUC SYSTEM AS AN ALTERNATIVE TO SPECIAL SURCHARGES ON (PEVS)

- Seattle Electric Vehicle Association (SEVA) is a key partner
PARTNER WITH DOL TO ASSIST IN ADMINISTERING THE ODOMETER CHARGE

- Washington Department of Licensing (DOL) is a key partner
- Pilot will utilize DOL’s network of subagents to support the manual odometer read option
  - Pilot regions are defined to contain multiple potential subagent locations
REPRESENT THE GEOGRAPHIC DIVERSITY OF THE ENTIRE STATE

Total Population

- 6.9 million
- ~5.5 million
- aged 18+
RECOMMENDED GEOGRAPHIC DISTRIBUTION OF PILOT RECRUITING REGIONS
RECOMMENDED GEOGRAPHIC DISTRIBUTION OF PILOT RECRUITING REGIONS

• **Central Puget Sound.** This region has the majority of the state’s population and will provide perspectives from primarily urban and suburban drivers regarding RUC. It also includes the largest concentration of PEV drivers in the state.

• **Eastern Washington.** This region includes Spokane and Pullman, and features a fair amount of cross-border travel to Idaho. It includes a mixture of urban, suburban, and rural residents.

• **Northwest Washington.** Recruiting from this region will include primarily rural residents but will have a special focus on the international interoperability aspects.

• **South-Central Washington.** This region will provide a mixture of urban (Tri-Cities) and rural drivers from surrounding counties.

• **Southwest Washington.** This region will provide primarily urban drivers in a region with a high volume of cross-border travel with Oregon.
PARTICIPANT RECRUITMENT PLAN

Shannon Crum, D’Artagnan Consulting
ASSOCIATED DOCUMENTS

- Website Communication Plan
- Media Strategy
- Outreach Strategy
RECRUITING PLAN GOAL

• Recruit up to 2,000 vehicles from diverse locations in Washington to participate in a test of RUC methods.
• In addition to vehicles from Washington, up to 200 vehicles from Surrey, BC will be invited to participate in the pilot, and approximately 20 from Oregon’s OreGO program.
KEY RECRUITING ACTIVITIES

- Define channels for sharing facts about the pilot project
- Identify key partners in recruitment efforts
- Raise public and stakeholder awareness about the need for a long-term transportation funding solution and that a RUC may be a potential successor to the gas tax
- Provide interested volunteers with basic information that describes what they will be required to do as a participant in the pilot, and when they will need to do it
RECRUITING BY THE NUMBERS

• Up to 200 participants from Surrey, British Columbia
• Up to 20 participants from Oregon
• At least 25 plug-in electric vehicles (PEVs) recruited in cooperation with the Seattle Electric Vehicle Association (ceiling of 100)
• Up to 2000 participants recruited from 5 regions of Washington (including PEVs recruited in cooperation with SEVA):
  • Central Puget Sound
  • Northwest Washington (includes the International Interoperability test zone)
  • South-Central Washington
  • Southwest Washington (includes the primary Interstate Interoperability test zone)
  • Eastern Washington
RECOMMENDED GEOGRAPHIC DISTRIBUTION OF PILOT RECRUITING REGIONS
RECRUITING FRAMEWORK: INTEREST LIST

Pilot Website Interest List

- Tell Your Friends
- Indicate Interest in Volunteering
- Ask Questions
- Sign up for Newsletters / follow us
RECRUITING FRAMEWORK: RUC AMBASSADORS

• Single most important component of the pilot recruiting strategy
• In the beginning…
  • RUC Ambassadors are drawn from the membership of the Steering Committee, the Commission, and WSDOT
• Throughout Phase 1…
  • Core group of Ambassadors will recruit additional RUC Ambassadors through interaction with partner organizations and one-on-one briefings with key influencers in Washington
THE RECRUITING PIPELINE

Pool → Interest List → Prospects → Qualified

Participants
ASSETS THAT SUPPORT RECRUITING EFFORTS

- Pilot Website and Interest List
- News Releases
- Op-Ed copy
- Interviews with WSTC and Steering Committee members
- Email newsletters
- e-newsletter copy for partners and stakeholders
- Printed media (FAQs, posters, postcards)
- Ambassador Talking Points
- Pilot Twitter account
- PowerPoint presentations
- Paper Interest List
### RECRUITING STREAMS

<table>
<thead>
<tr>
<th>Traditional Media</th>
<th>Digital</th>
<th>Stakeholders &amp; Partners</th>
<th>Public Meetings</th>
<th>Briefings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broad geographic coverage</td>
<td>Pilot Website with Interest List</td>
<td>In-person presentations about pilot and invitation to join the interest list</td>
<td>1-on-1 meetings with key influencers, explaining program, inviting to join, and recruiting as ambassadors</td>
<td></td>
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<tr>
<td>Fact-based</td>
<td>Partner Email lists and digital media (SEVA, VOW, MPOs/RTPOs, DOL, etc.)</td>
<td>Posts in DOL offices/DOL Spotlight</td>
<td></td>
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</tr>
<tr>
<td>Always includes link to Website/Interest List</td>
<td>Tweets by DOL, WSTC</td>
<td>Content for partner newsletters and websites</td>
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<tr>
<td>Sign-up form</td>
<td>Targeted Social Media</td>
<td>Presentations to stakeholder and partner meetings/events</td>
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<td></td>
<td></td>
<td>Account Manager Recruiting and Incentives</td>
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Recommendation: develop recruiting “toolkits” targeted to each recruiting stream. Examples of materials that would be included in each toolkit are basic PowerPoint presentations about the pilot, publication-ready newsletter copy, social media copy, and elevator speeches.
## Traditional Media Stream

<table>
<thead>
<tr>
<th>Phasing</th>
<th>Carries throughout all pilot phases – see Communications Plan</th>
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<tbody>
<tr>
<td></td>
<td>• Educate and Inform in Phases 0 and 1</td>
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<tr>
<td></td>
<td>• Encourage Interest List Sign-ups in Phase 1</td>
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<tr>
<td></td>
<td>• Update, Encourage, and Influence in Phases 2 and 3</td>
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<table>
<thead>
<tr>
<th>Target Audience</th>
<th>General Population in Target Regions</th>
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<tbody>
<tr>
<td></td>
<td>• Broad Geographic Coverage</td>
</tr>
<tr>
<td></td>
<td>• Local newspapers</td>
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<tr>
<td></td>
<td>• Local television news</td>
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<td>• Local radio</td>
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<table>
<thead>
<tr>
<th>Assets</th>
<th>ALWAYS include link to website interest list</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• News releases</td>
</tr>
<tr>
<td></td>
<td>• Op-Ed copy</td>
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<td></td>
<td>• Interviews with members of Steering Committee and WSTC</td>
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</tbody>
</table>
DIGITAL MEDIA STREAM

Phasing
Carries throughout all pilot phases

Target Audience
General Population in Target Regions
• Members of Interest List and Volunteer Pool
• Partner email lists
• Specific sub-populations if insufficient interest
  • e.g. PEV drivers, border-region residents

Assets
ALWAYS include link to website interest list
• Pilot Website with Interest List
• Email newsletters and announcements leveraging partner email lists
• Pilot project twitter account
• Audience-specific e-newsletter copy; e.g. for SEVA
• Video Interviews with members of Steering Committee and WSTC
• Targeted social media campaigns to specific subpopulations
DIGITAL MEDIA STREAM: PILOT WEBSITE

Pilot Website Interest List

Tell Your Friends

Indicate Interest in Volunteering

Ask Questions

Sign up for Newsletters/ follow us
<table>
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<th>Phases 0 and 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Audience</td>
<td>Stakeholder/partner interest groups</td>
</tr>
<tr>
<td></td>
<td>• Local Geographic Coverage</td>
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<tr>
<td></td>
<td>• Membership of SEVA, AAA, Chambers of Commerce, ACEC, MPO/RTPs, etc.</td>
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<tr>
<td>Activities</td>
<td>• Presentations to interest groups (e.g. at breakfast or lunch meetings, workshops, and conferences)</td>
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<td></td>
<td>• One-on-one or small group briefings with organization leadership</td>
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<td></td>
<td>• Post paper assets in Partner facilities</td>
</tr>
<tr>
<td>Assets</td>
<td>ALWAYS include link to website interest list</td>
</tr>
<tr>
<td></td>
<td>• PowerPoint presentations</td>
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<td></td>
<td>• Printed handouts (postcards, FAQs, posters, etc.)</td>
</tr>
</tbody>
</table>
STAKEHOLDERS & PARTNERS STREAM

1. Announce presentation on partner’s website
2. Prepare and Distribute Local News Release announcing presentation
   - Invite local media
3. Give Presentation
   - Circulate paper interest list (and update e-interest list)
   - Distribute paper assets (postcards, FAQs)
4. Any media coverage of the event should contain a link to the pilot website
STAKEHOLDERS & PARTNERS STREAM – NON-WASHINGTON VOLUNTEERS

- **Phasing**
  Phases 0 and 1

- **Target Audience**
  Interoperability Volunteers
  - OreGO members who travel to Washington
  - Residents of Surrey, BC and Greater Vancouver who travel to Washington

- **Activities**
  - Coordination with OReGO staff to identify and invite appropriate motorists
  - Support for Surrey, BC staff to recruit motorists

- **Assets**
  ALWAYS include link to website interest list
  - PowerPoint presentations
  - News Releases
  - Printed handouts (postcards, FAQs, posters, etc.)
PUBLIC MEETINGS STREAM

Phasing
Phases 0 and 1

Target Audience
General Public in Target Regions
- Local Geographic Coverage
- Citizens, transportation professionals, policy makers

Activities
Make Presentations at Public Meetings
- Presentations
- Panel Discussions
- Information Tables

Assets
ALWAYS include link to website interest list
- PowerPoint presentations
- Printed assets (postcards, FAQs)
- Paper interest list (to add to e-interest list)
PUBLIC MEETINGS STREAM

1. Announce presentation on Pilot Website
2. Announce presentation on Partner’s Website
3. Prepare and Distribute Local News Release announcing presentation
   - Invite local media
4. Give Presentation
   - Circulate paper interest list (and update e-interest list)
   - Distribute paper assets (postcards, FAQs)
5. Any media coverage of the event should contain a link to the pilot website
## BRIEFINGS STREAM

<table>
<thead>
<tr>
<th>Phasing</th>
<th>Phases 0 and 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target Audience</strong></td>
<td><strong>Policy Makers, Key Influencers</strong></td>
</tr>
<tr>
<td>• Local Geographic Coverage</td>
<td>• Legislators, transportation leadership, state agency leaders, media</td>
</tr>
<tr>
<td><strong>Activities</strong></td>
<td><strong>One-on-one or small group briefings</strong></td>
</tr>
<tr>
<td><strong>Assets</strong></td>
<td><strong>ALWAYS include link to website interest list</strong></td>
</tr>
<tr>
<td>• Talking points/Briefing packets</td>
<td>• PowerPoints for Audience to use should they wish to become ambassadors</td>
</tr>
<tr>
<td>• Printed assets (postcards, FAQs)</td>
<td>• Paper interest list (to add to e-interest list)</td>
</tr>
</tbody>
</table>
INCENTIVES

- Value-added services provided by account managers:
- “Volunteer of the Month” feature on pilot website:
- Awards upon completion of each milestone: Examples of milestones include the following:
  - Successfully installing equipment or mobile apps
  - Completing a manual odometer reading
  - Completing a survey or focus group
  - “Paying” an invoice
  - Returning OBDII devices at the end of the pilot
- Cash compensation for time spent on pilot activities
- Direct incentives by account managers to enrolled customers
PILOT PROJECT COMMUNICATIONS & MEDIA STRATEGY

Allegra Calder, BERK Consulting
COMMUNICATIONS PLAN TO SUPPORT PILOT LAUNCH

• Umbrella document to guide all communications efforts and ensure consistency
• Establishes the communications goals and principles
• Identifies three primary audience types and strategies for each
• Assumes Commission Staff, Commissioners and consultants will take on the bulk of the work, but there is a role for Steering Committee members
• Any comments or questions about the draft document?
• What do you think is the most important thing to communicate right now (prior to the pilot)?
• Any thoughts on what will be most critical once the pilot is announced and recruiting begins?
• We have identified several Steering Committee members to serve as spokespeople. What other roles do you want to play?
MEDIA STRATEGY

• Focus on education and awareness in advance of key decisions/milestones
• Transparency through outreach and external portals (website, social media)
• Range of spokespeople available, depending on interest and topic
• Clear, concise external materials available throughout process
• Coordination with key state offices and elected officials
PROJECT WEBSITE

Priya Singh, PRR
PROJECT WEBSITE

- Branding
  - Name
  - Tagline
  - Logo
- Website
BRANDING — NAME

Explored three types of names:

• Option 1: EverGO
  • Evergreen State
  • Forever (sustainable) funding
  • Green
  • Cooperates with OreGO

• Option 2: Miles Ahead
  • Forward-looking, solution-oriented

• Option 3: WA RUC
  • Concise and says what it is
BRANDING — TAGLINE

• What’s in the tagline?
  • Invoke “pilot” or “test drive”
  • Be forward-looking
  • Ensure tagline works with name

• Final taglines:
  • Test Drive the Road Ahead
  • Test Drive the Future
  • Test Drive the Next Mile
  • Piloting the Road Ahead
BRANDING – LOGO

- Other RUC state logos
BRANDING – LOGO

- Other Washington State logos considered

Test Driving The Road Ahead

Test Driving The Road Ahead
BRANDING – COLORS

SEAHAWKS

SOUNDERS
WARUC
Test Drive the Road Ahead
COORDINATION & CONSULTATION: DIRECTIVES

Coordination (Task 1.1):

- Required for agencies that may have an active role in the pilot project operations
- Includes: WSTC, Department of Licensing and WSDOT
- Primary desired outcome: identification of specific role and activities required to support implementation of the pilot project

Consultation (Task 3.0):

- Required for agencies that may have a future interest in the performance of any future RUC system
- Must include: Office of State Treasurer, Department of Revenue
- Additional agencies as interested: Office of Financial Management, Puget Sound Regional Council, Governor
- Primary desired outcome: identification of potential issues in a future RUC system
Activities to date:

• Five separate meetings with individual agencies, including operational staff and agency executives

• Development of pilot project functions and proposed roles/responsibilities technical document to help with pilot implementation plan and next phase of pilot set-up

Moving forward:

• Large meeting of the “consultation agencies” scheduled in November, to report pilot planning activities and Steering Committee direction

• Regularly scheduled meetings and coordination with pilot project agency working group throughout all phases of the pilot

• Continued periodic meetings with agency consultation group
STATUS OF OTHER TASKS & NEXT STEPS

Jeff Doyle, D’Artagnan Consulting
Agency Roles in the Pilot (Task 1.1):
• Draft technical memo *Road Usage Charge Pilot Functions* in progress

Pilot Project Expenditure Plan and Revenue Estimates (Task 1.5):
• Project expenditure plan being prepared for WSTC
• (Hypothetical) revenue estimates from Washington RUC system to be tested in pilot. Results to be shared with Steering Committee. ETA: December 2016.

Pilot Procurement Strategy (Task 1.6):
• For WSTC use in deciding how best to contract with technology and RUC account service providers. Draft in progress.
NEXT STEPS

Next Steps (Phase “0”):

- Based on Steering Committee feedback, revise:
  - Evaluation Measures
  - ConOps, SRS and ICD
  - Approach to recruiting up to 2,000 test vehicles for the pilot
  - Communications Plan

- Complete remaining tasks (Agency roles in pilot, Procurement strategy, etc.)

- Finalize all material into *draft Final Pilot Project Implementation Plan*, and send to Steering Committee for review before December 12.

- Present *Pilot Project Implementation Plan* at WSTC’s mid-December meeting. Transmit to Governor and Legislature early January.
Phase 1 Milestones:

- Federal funding decision for Phases 2 and 3 (live pilot test, evaluation and reporting): Spring 2017
- Launch of recruiting period for pilot project test vehicles: Spring/Summer 2017
- Testing of Operational Concepts, technologies and account management services: Summer 2017
- Enrollment of pilot project test vehicles: Summer/Fall 2017
- Commence Washington RUC Pilot Project test drive: Fall 2017
NEXT STEPS: FUTURE STEERING COMMITTEE MEETINGS

Phase 1 Milestones:

- FHWA Funding Decision
- Launch recruiting
- System test period
- Enroll test vehicles
- Drive!

Possible In-Person Steering Committee Meetings
PUBLIC COMMENT
THANK YOU

Consultant support provided by: